Documents Versioning

Specification	Document Versioning
Target Application	PLF 4.3
Owner	Thomas Delhoménie
Status	DRAFT - REVIEW - **VALIDATED**

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The video of the spec review is available here

Rationale

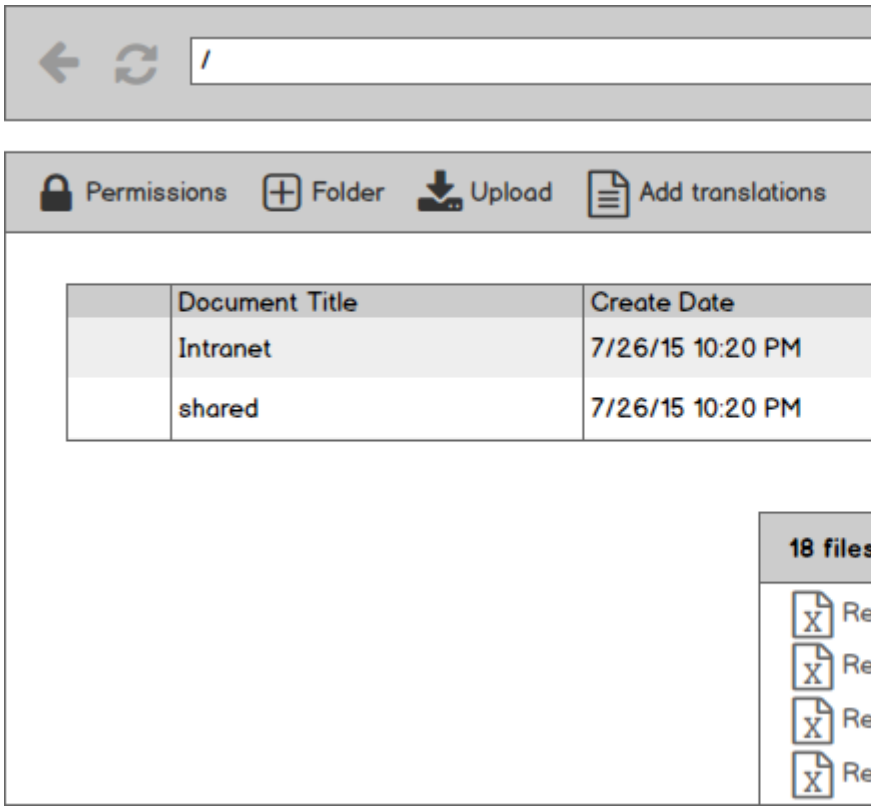
Manually versioning files is currently cumbersome. It requires to activate versioning for each individual document and to checkout > edit > remove file > upload > save > check in. Many users take versioning for granted and expect the system to take care of that for them. In many cases, versioning could be done automatically when a user overwrites a file.

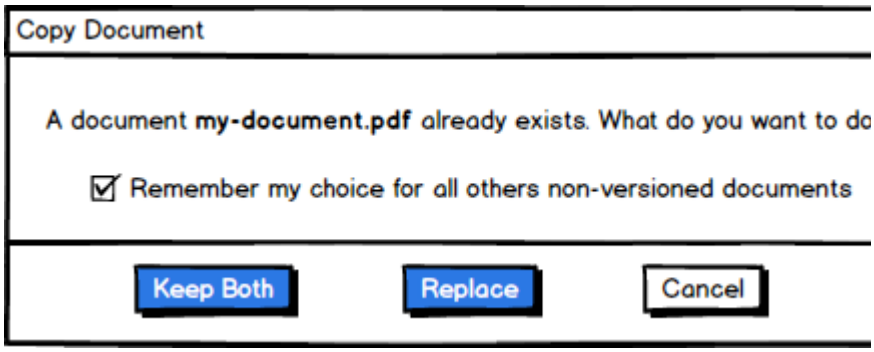
The goal of this spec is to improve the Document Versioning feature to make it far more intuitive and easy to use.

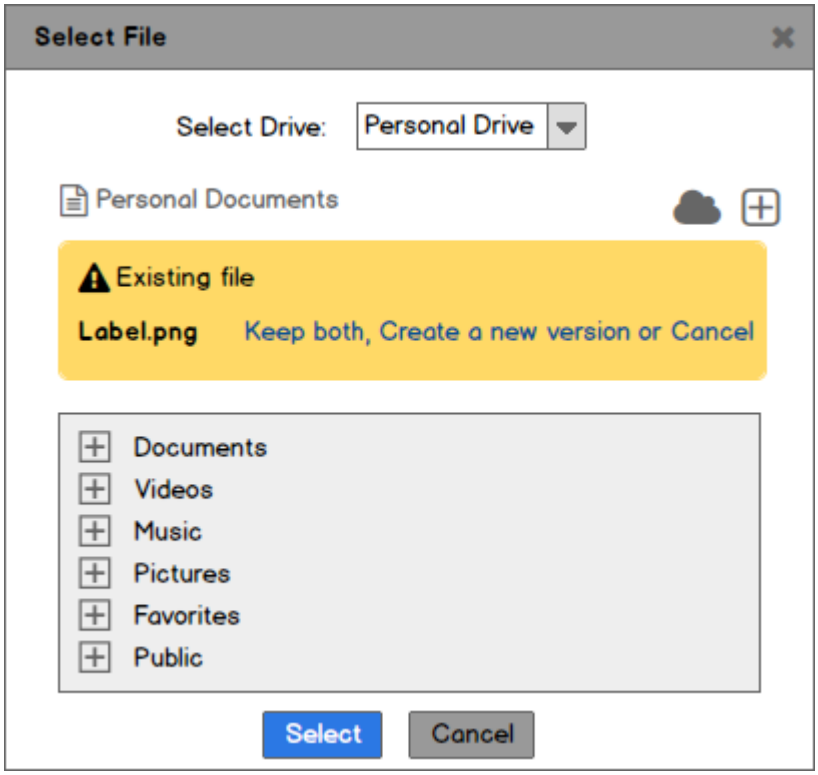
Requirements

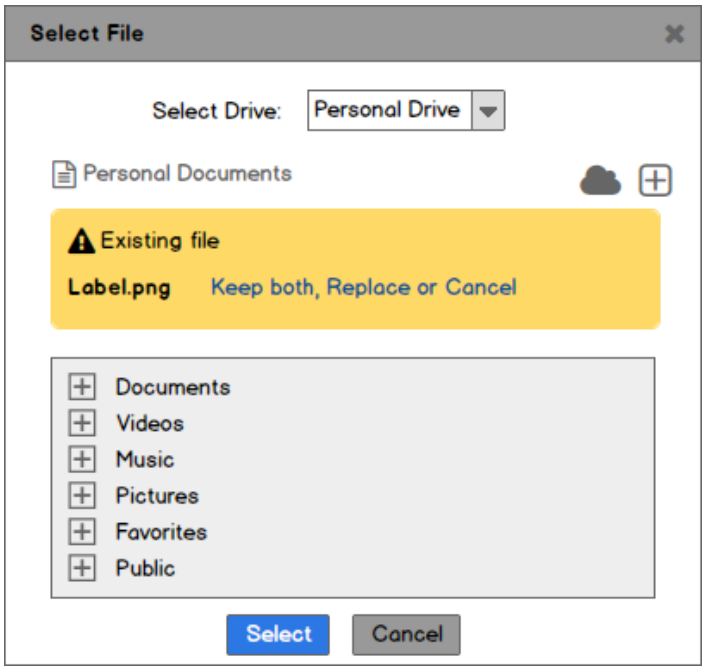
Creating new versions

Version	Rule	
4.3	DOC_AUTO_VERSION_CREATE_00	Document versioning only applies to documents (nt:file), not to contents.
4.3	DOC_AUTO_VERSION_CREATE_01	A new configuration variable **exo.ecms.documents.versioning.drives** is available ir separated by commas. Defaults to **Managed Sites,Groups,Personal Documents**.
4.3	DOC_AUTO_VERSION_CREATE_02	When a new document is uploaded in one of the drives defined in **exo.ecms.docu** not versioned.
4.3	DOC_AUTO_VERSION_CREATE_03	A new version of a document can be created with the following ways : • in the Content Explorer, upload a document in a folder (button **Upload** • in the Content Explorer, in a folder, drag and drop a document directly • from the Document Selector (used in the Activity Stream and in the "In • in the top bar, upload from the **Upload a file** menu in a folder where a d
		In the Content Explorer, uploading a document via the drag and drop action or via the multi-upload UI component, as currently). The label for the multi-upload component are slightly updated to suggest : • If the document is a versionned document :

		Keep both : no version of the existing document is created, but a new c **Upload new version** : a new version of the file is created **Cancel** : the upload is canceled • If the document is a non versionned document : **Keep both** : no version of the existing document is created, but a new c **Replace** : removes totally the previous document and its version histor name, title, description, ...). **Cancel** : the upload is canceled
4.3	DOC_AUTO_VERSION_CREATE_03a	
		In the Content Explorer, copy pasting a document in a folder which contains a doc • If the document is a versionned document : Clicking on **Keep Both** creates a new document, with the same name.

4.3	DOC_AUTO_VERSION_CREATE_03b	Clicking on **Create a new version** uploads the new document and creat (no need to checkin/checkout). Clicking on **Cancel** aborts the upload. • If the document is a non versionned document : Clicking on **Keep Both** creates a new document, with the same name. Clicking on **Replace** removes totally the previous document and its ver (file name, title, description, ...). Clicking on **Cancel** aborts the upload.
4.3	DOC_AUTO_VERSION_CREATE_03c	In the Content Explorer, copy pasting multiple documents in a folder which contair • if the document is a versioned document, it will display the following pc • if the document is a non-versioned document, it will display the followir  In both cases, if the checkbox is checked, the popup will not be displayed for the r (versioned/non-versioned) document (the user can then decide again to remembe

		The checkbox is checked by default.
4.3	DOC_AUTO_VERSION_CREATE_03d	From the Document Selector used in the Activity Stream and in the Top Bar, uploa • if the document is a versionned document : **Keep both** : no version of the existing document is created, but a new d **Create new version** : a new version of the file is created **Cancel** : the upload is canceled No action : if the user does not click on any of the 3 actions, the new ve  • if the document is a non versionned document : **Keep both** : no version of the existing document is created, but a new d **Replace** : removes totally the previous document and its version histor name, title, description, ...). **Cancel** : the upload is canceled No action : if the user does not click on any of the 3 actions, the new ve



From the Document Selector used in the "Insert Content Link" button in CKEditor,

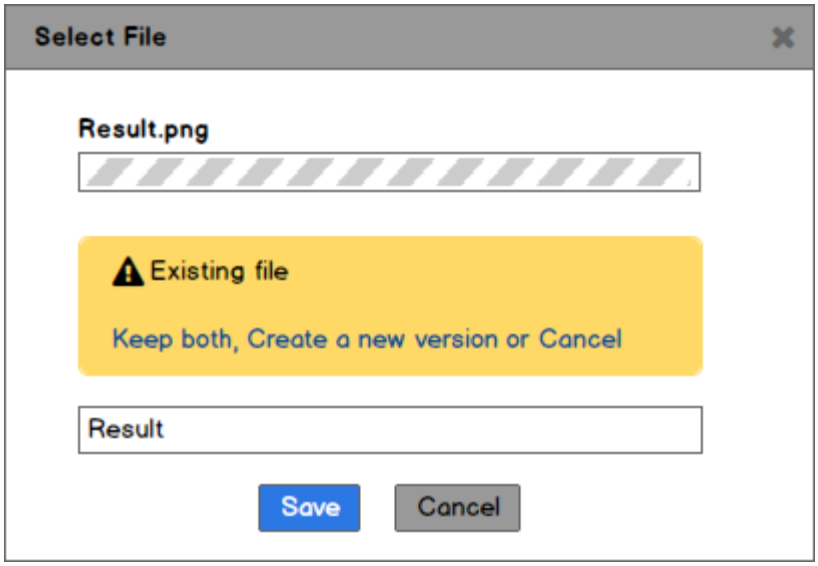
- if the document is a versionned document :

  Keep both : no version of the existing document is created, but a new c

  Create new version : a new version of the file is created

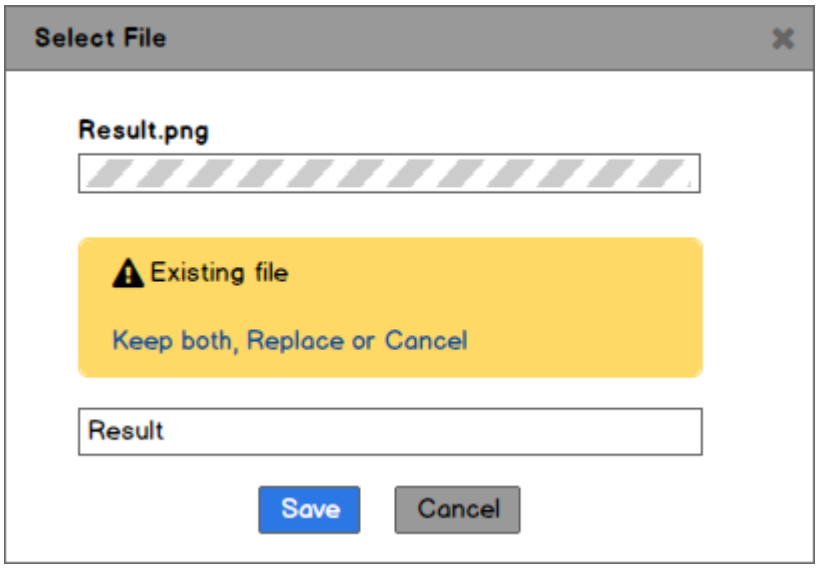
  Cancel : the upload is canceled

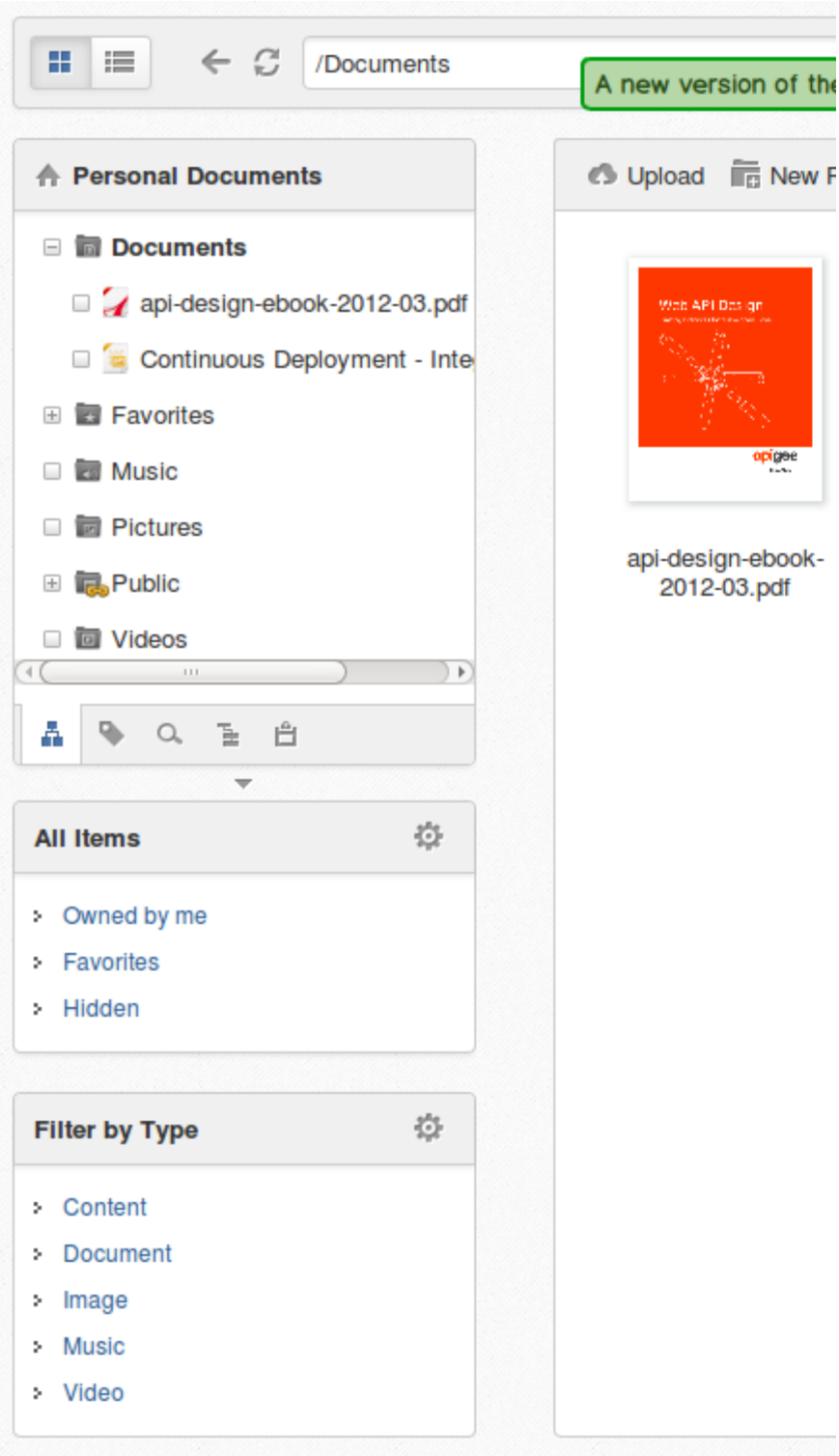
  No action : if the user does not click on any of the 3 actions, the new ve



4.3 DOC_AUTO_VERSION_CREATE_03f

- if the document is a non versionned document :

		Keep both : no version of the existing document is created, but a new d **Replace** : removes totally the previous document and its version histor name, title, description, ...). **Cancel** : the upload is canceled No action : if the user does not click on any of the 3 actions, the new ve 
4.3	DOC_AUTO_VERSION_CREATE_06	When a versioned document is displayed (preview mode) in the Content Explorer after the button "Edit Document Properties" (see DOC_AUTO_VERSION_EDIT_02 current document automatically. This is no confirmation window in this case.
4.3	DOC_AUTO_VERSION_CREATE_07	When creating a new version of a versioned document by drag & drop directly on be the same. In such a case the existing file name is used (not the name of the ne
		When a new version has been uploaded via a copy paste or via the button **Uploa**

4.3	DOC_AUTO_VERSION_CREATE_08	
4.3	DOC_AUTO_VERSION_CREATE_09	The right-click action **Checkout** and **Checkin** are not necessary anymore and mus
4.3	DOC_AUTO_VERSION_CREATE_10	A new right-click action called **Create a new version** is available on versioned doc version must be created after document properties only have been changed. Once
4.3	DOC_AUTO_VERSION_CREATE_11	If the value of the property **exo.ecms.documents.versioning.drives** is updated to a automatically unversioned). Only the new documents are impacted by the updates

Viewing the versions

Version	Rule	Description
4.3	DOC_AUTO_VERSION_VIEW_01	The button **Versions** is always available in the Action bar (in all the default views) when a document is displayed and is versioned. So the button is not visible if the displayed document is not versioned.
4.3	DOC_AUTO_VERSION_VIEW_02	When clicking on the **Versions** button, if the document is versioned, the **Versions** window is displayed, listing all the versions.

Editing the document properties

The Edit button available in the Action bar of the Content Explorer currently opens a form allowing to update the document properties (title, description, ...), and to update the document binary (part of the checkout/checkin process). This is quite confusing since we also use this button for content editing, so users could think they will be able to update the document content via this action.

The need here is to edit the document metadata. There is already a button **Metadata** in platform which only displays the metadata (actually the Dublin Core metadata, not all the JCR properties).

All put together is quite confusing. To simplify things, the following rules must be applied.

Version	Rule	Description
4.3	DOC_AUTO_VERSION_EDIT_01	The **Edit** button of the Action bar is removed when a document is displayed (but we keep it for contents).
4.3	DOC_AUTO_VERSION_EDIT_02	A new button called **Edit Document Properties** is available in the Action tool bar when a document is displayed. Clicking on it displays a form to update the document properties (as currently), except the document binary.
4.3	DOC_AUTO_VERSION_EDIT_03	Saving changes of the properties of a versioned document does not create a new version.

WebDAV

Version	Rule	Description
4.3	DOC_AUTO_VERSION_WEBDAV_01	Creating a new document through WebDAV is similar to creating it through the Content Explorer, if it is in one of the drives defined in **exo.ecms.documents.versioning.drives** it activates the versioning for this document and creates a first version.
4.3	DOC_AUTO_VERSION_WEBDAV_02	When a new version of a non-versioned document is uploaded through WebDAV, the new version replaces the existing one.
4.3	DOC_AUTO_VERSION_WEBDAV_03	When a new version of a versioned document is uploaded through WebDAV, the new version is automatically created.
4.3	DOC_AUTO_VERSION_WEBDAV_04	The configuration property **exo.webdav.auto-version** is not relevant anymore and must be removed (the value **checkout-checkin** will always be used).

Controlling the versions history

Versioning all the documents can increase significally the data volume. Options must be given to control this data volume.

Version	Rule	Description
4.3	DOC_AUTO_VERSION_CONTROL_HIST_01	A new configuration property called **exo.ecms.documents.versions.max** allows to define the max number of versions that a document can have. When a new version is added for a document, if the max number is reached, only the X last versions are kept, the other ones are permanently deleted. A non-positive value means no limit. Defaults to 0 (so no limit).
4.3	DOC_AUTO_VERSION_CONTROL_HIST_02	A new configuration property called **exo.ecms.documents.versions.expiration** allows to define the expiration time (in days) of a document version. When the expiration time is reached, the version is permanently deleted. The last version of a document is never deleted. A non-positive value means no limit. Defaults to 0 (so no limit).